CENTRE FOR REGIONAL AND LOCAL ANALYSES

REGIONAL INVESTMENT ATTRACTIVENESS 2012

Opole voivodship

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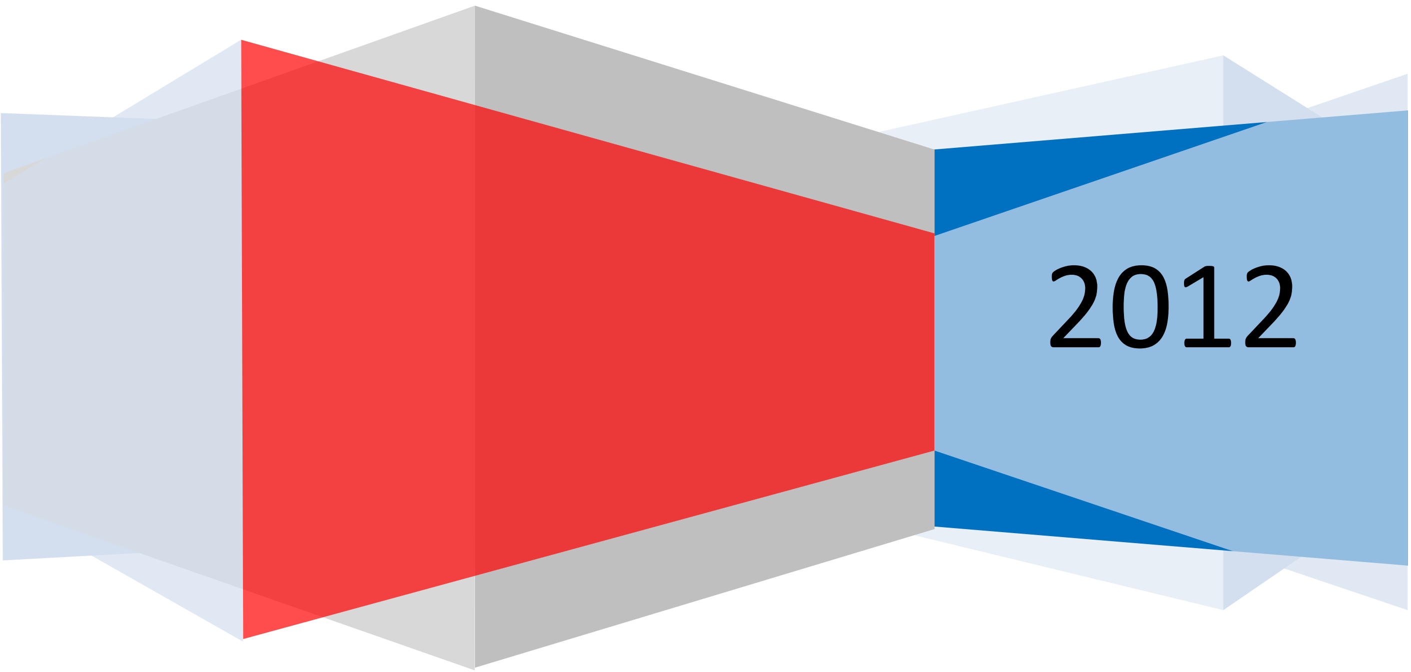


Warsaw, October 2012

Introduction

This report has been prepared thanks to the application of results of scientific research conducted since 2002 by the Institute of Enterprise, Collegium of Business Administration of the Warsaw School of Economics, under the supervision of Prof. H. Godlewska-Majkowska, Ph.D. All Authors are core members of the team that develops the methodology of calculating regional investment attractiveness in order that important characteristics of regions are captured as closely as possible both in general terms and from a point of view of specificity of a given kind of business activity as well as a size of investment.

Potential investment attractiveness (PAI) indices measure the location-specific advantages of regions. In their simplified version they are calculated for territorial units of various levels of statistical division of the country (gminas/communes, poviats/counties, subregions, voivodships/regions). These are PAI1 indices, which refer to the whole regional/national economy (PAI1_GN) and selected sections: C – manufacturing industry, G – trade and repair, I – tourism and catering, M – professional, scientific and technical services.

Besides, some indices are only calculated for voidoships on the basis of much more characteristics available on the regional or macroregional level. This allows us to evaluate their investment attractiveness in a much broader context. These are PAI2 indices, which are calculated both from a general point of view and with reference to the above mentioned sections of the economy (PAI2_C, PAI2_G, PAI2_I, PAI2_M).

What is more, real investment attractiveness ranks are used in this report, which relates to the inflow of capital (in the form of investments) and the effects of investments considered from a point of view of productivity and returns on the outlays previously made.

The measurements in use are subject to annual review thanks to consulting them with foreign investor assistance institutions and direct contact to territorial self-government units as well as organisations of entrepreneurs. A description of methodological approach to measuring investment attractiveness of Polish regions, counties and communes can be found online on the Web site of the Institute of Enterprise : www.sgh.waw.pl/instytuty/ip, on the Web site of the Centre for Regional and Local Analyses, which cooperates with the Institute of Enterprise: www.caril.edu.pl, as well as in numerous scientific publications and expert opinions.

1. The profile of regional economy of Opole voivodship

Opolskie voivodship is situated in the south-western part of Poland. It is a region with very intensive agriculture thanks to which it is a beneficial location for food industry. The high level of agrarian culture is conducive to this and so are very fertile soils. The region has long-established industrial traditions, in particular in the manufacture of food, mineral products, metal products, machinery and equipment as well as chemicals and chemical products. Its near-border location and numerous border crossings (both road and railway ones) predisposes the region to cooperation with Germany and the Czech Republic.

The advantages of the voivodship are also:

- its location on main domestic and European traffic routes (A4 highway),
- an excellent access to inland shipping thanks to the Oder and the Gliwice-Kędzierzyn Koźle channel (the port in Kędzierzyn is the largest inland port in Poland),
- well-developed communiations infrastructure including access to the Internet (the voivodship belongs to the highest rated regions in Poland),
- the presence of higher education institutions,[1]
- rich resources for the manufacture of mineral products – the possibility of specialisation in sectors supporting the construction industry,
- the multicultural mindset of the inhabitants of the voivodship which results in their tolerance and openness to the inflow of foreign capital; this feature is strengthened by the membership of Opole voivodship of the Praded euroregion and the Silesia euroregion.

Chart 1. General characteristics of the economy of Opole voivodship

Feature	Opole voivodship	Poland	Share [%]
Market Potential			
GDP per capita (PLN/person) in 2009	28,761	35,210	-
Population (persons) on 31 December 2011	1,013,950	38,538,447	2.6
Human Resources Potential			
Higher education institutions graduates (persons) in 2011	11,492	492,646	2.3

[1] In 2010 the Ministry of Science and Higher Education ranked among the best scientific establishments in Poland the following ones: the Institute of Heavy Organic Synthesis 'Blachownia' in Kędzierzyn-Koźle, the Faculty of Construction and the Faculty of Technical and IT Education of the Opole University of Technology, the Faculty of Philology of the University of Opole.

Secondary schools graduates (persons) in 2011	11,067	421,724	2.6
Number of employed persons on 31 December 2011	314.242	13.911.203	2.3
Structure of employed persons in 2011	agriculture 11.9% industry 36.5% services 51.6%	agriculture 12.7% industry 30.6% services 56.7%	
Investment outlays and capital of companies with foreign capital participation in the voivodship			
Investment outlays (PLN mln) in 2010	749.9	61,600.3	1.2
Capital of companies (PLN mln) in 2010	1,729.7	188,812.4	0.9
Special economic zones (SEZs) in the voivodship			
- The Wałbrzych SEZ, subzones: Kluczbork, Namysłów, Nysa, Praszka, Prudnik, Skarbimierz, Opole (city), - The Katowice SEZ, subzones: Gogolin, Kietrz, Krapkowice, Strzelce Opolskie, Ujazd, Kędzierzyn-Koźle (city) - The Starachowice SEZ, subzone Tułowice			
Investment attractiveness			
Potential investment attractiveness (location-specific advantages evaluation)			
Real investment attractiveness (economic effects evaluation)	National economy class C Trade class C		

Poviats and gminas distinguished according to the Potential Attractiveness Index for the national economy		
Poviats	Class A	Opole (city)
	Class B	
Gminas**	Class A	Brzeg (1), Opole (1), Kędzierzyn-Koźle (1), Zdzieszowice (3), Dobrzeń Wielki (2), Prudnik (3), Tułowice (2), Skarbimierz (2) , Namysłów (3), Gogolin (3)
	Class B	Nysa (3), Chrząstowice (2), Kluczbork (3), Bierawa (2), Krapkowice (3), Ujazd (3), Niemodlin (3), Tarnów Opolski (2)

In 2009 Opole voivodship made a contribution of 2.2% to the GDP of Poland. . Calculated per capita, it amounted to PLN 28.761 with the average for Poland PLN 35,210. With this result the voivodship occupies the eleventh place in the country. The GDP growth rate in the period 2003-2009 amounted to 160.2% while the national average reached 168.5%.

In comparison with the whole country the structure of employment in the voivodship is characterised by a relatively low share of the service sector (51.6%) whereas a share of the agricultural and industrial sectors is respectively 11.9% and 36.5% (CSO, RDB 2012).

The number of inhabitants of the voivodship amounts to 1.013.950 (as of 2011), which makes up 2.6% of the population of Poland. The age structure of the voivodship in 2010 was as follows: 13.4% of the population at pre-reproductive age, 69.2% at reproductive age and 17.4% at post-reproductive age (for Poland, respectively, 15.1%, 68.1% and 16.8%). The registered unemployment rate in the voivodship in August 2012 was 13.1%, compared to

12.4% in Poland[2]. The average gross monthly remuneration in enterprises sector in the first six months of 2012 amounted to PLN 3.231,0, which is 87.6% of average remuneration in Poland.

The main potential for human capital creation in the voivodship is constituted by 6 higher education institutions in which 38 thousand students study, which makes up 2.2% of all students Poland-wide. Moreover 2.6 % of pupils of secondary schools attend technikum schools and 3.1% vocational schools.

The voivodship's strategic sectors mentioned in the strategy of regional development include above all: the manufacture of chemicals and chemical products, the manufacture of food, construction and others: power industry, the manufacture of machinery and equipment, the manufacture of metallic and non-metallic mineral products, timber industry.

Preferential conditions of conducting business activities are offered in this voivodship i.a. by the following 3 special economic zone (in Polish: Specjalne Strefy Ekonomiczne, hence abbreviation SSE):

- Wałbrzyska SSE (Wałbrzych special economic zone), subzones: Kluczbork, Namysłów, Nysa, Praszka, Prudnik, Skarbimierz, the city of Opole,
- Katowicka SSE (Katowice special economic zone), subzones: Gogolin, Kietrz, Krapkowice, Strzelce Opolskie, Ujazd, the city of Kędzierzyn-Koźle,
- Starachowicka SSE (Starachowice special economic zone), subzone Tułowice.

2. Region's rank in terms of investment attractiveness in Poland

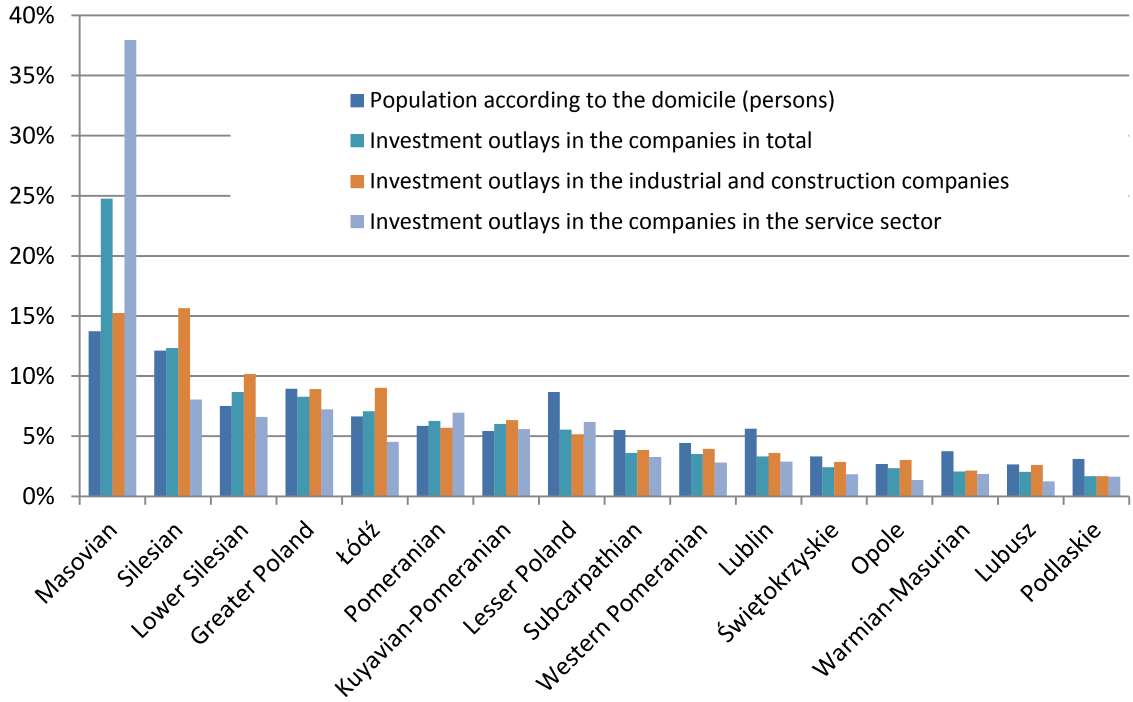
Opole voivodship is characterised by a rather low level of universal investment attractiveness, which manifests itself in its rank (Class D) according to the main potential investment attractiveness index for the whole national economy PAI 2_GN. Also the investment attractiveness of considered sections is below the average of all voivodships.

Investment attractiveness can also be determined on the basis of indices of real investment attractiveness (RAI), based on such microclimates as: returns on tangible assets, labour productivity, self-financing of self-government territorial units and investment outlays. The region ranked above the average in terms of RAI indices for the national economy (Class C) and trade and repairs section (Class C).

Potential and real investment attractiveness in reflected in the decisions of investors on the flows of capital. This is shown in Exhibit 1.

[2] The unemployment rate in voivodships, subregions and poviats in August 2012 is based on the data of Central Statistical Office.

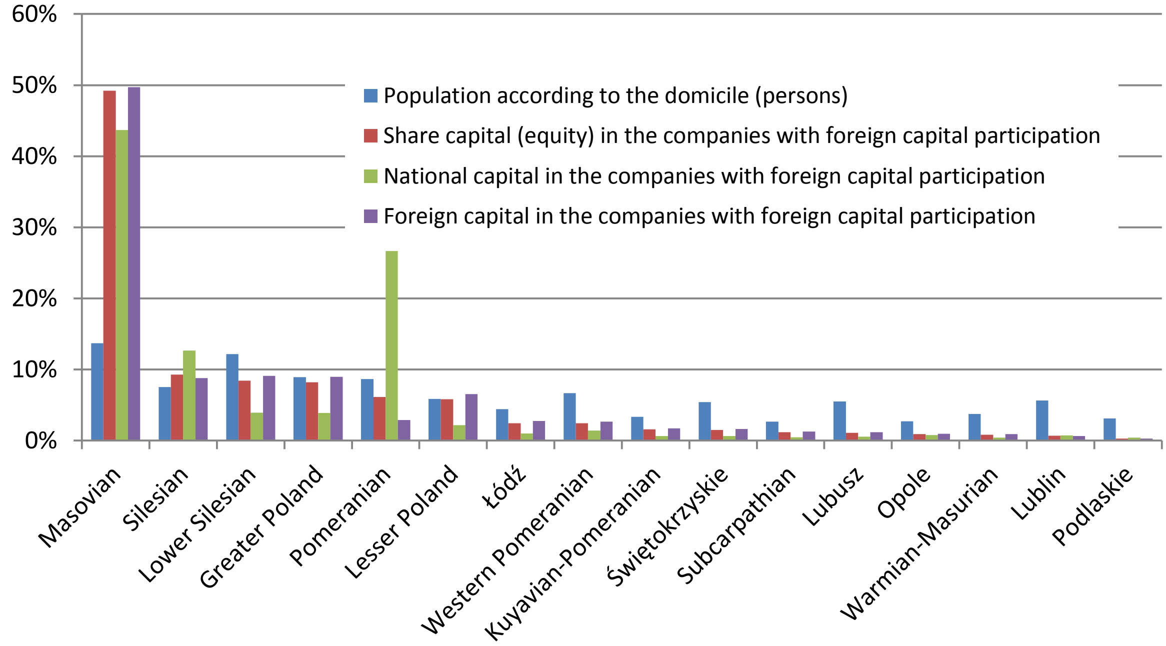
Exhibit 1. Regional structure of investment outlays in the companies in 2010 in comparison with the share in the population (percentage of country's population)



Note: these are the most up-to-date data.
Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

Opole region took the thirteenth place when it comes to the investment outlays in companies in 2010 (2.3% of its total value in all voivodships). This is too little considering the fact, that its share in the total population is 2.7%. This however applies mainly to services companies, as the share of Opole region in the investment outlays of this sector is only 1.4%. The voivodship is distinguished however by the high share of the investment outlays in agricultural companies (6.2%) as well as industrial and construction companies (3%). Its location at the border of the country and membership in euroregions create a chance of growth for foreign investment absorption. In the view of data on accumulated share capital in the companies with foreign capital participation it has to be stated, though, that this chance is not sufficiently used - see Exhibit 2.

Exhibit 2. Regional structure of capital in the companies with foreign capital participation in comparison with a share in population (% national population)

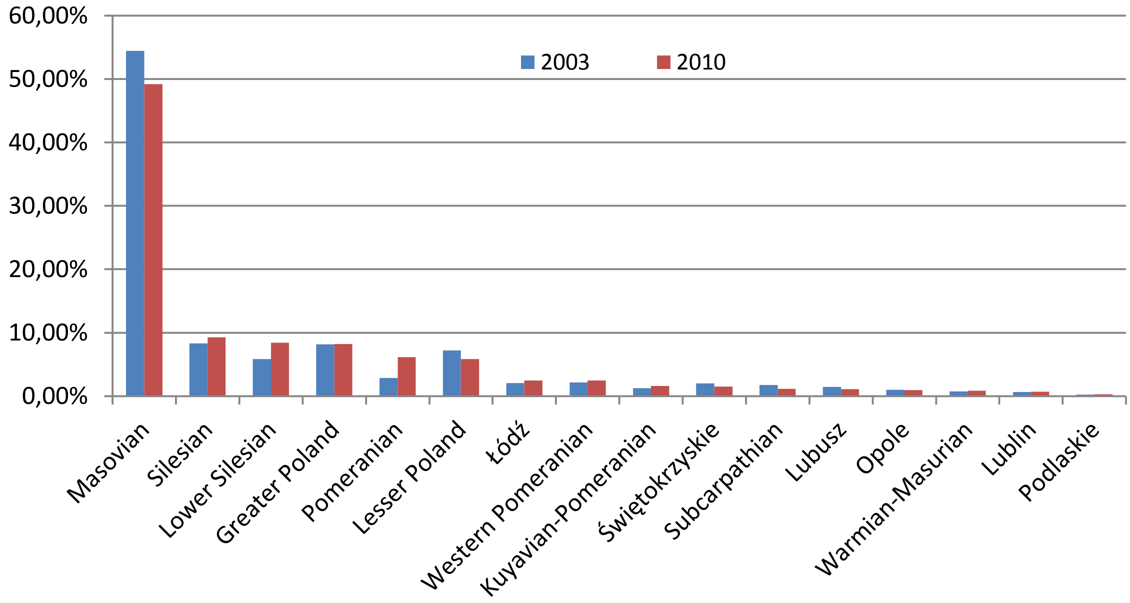


Note: these are the most up-to-date data.
Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

Although the share of Opole region in the country's population reached 3%, the accumulated share capital in the companies with foreign capital in all analyzed sectors is merely 1% of their national level. In the years 2003-2009 a weak competitive position on direct foreign investments market decreased slightly from 1.0% to 0.9% - see Exhibit 3.

In the years 2003-2010 in Opole voivodship the number of working places in companies with foreign capital participation increased from 18,562 to 24,909, which means by 34%. This was a little less dynamic growth than country's average (37%). The competitive position measured as a number of employees of entities with foreign capital participation decreased from 1.7% to 1.6%. This indicates that the voivodship in not using its cost-driven competitive advantages related to labour factor.

Exhibit 3. Regional competitive rank in terms of investments with foreign capital participation according to the value of share capital of the companies with foreign capital participation in 2003 and 2010 (percentage of national representation)



Source: Authors on the basis of the Local Data Bank (downloaded 23.10.2012)

An opportunity for Opole voivodship lies in neatly prepared investment offers. Self-government units of Opole voivodship should seek opportunities in careful preparation of offers of investment areas in accordance with their location-specific advantages.

3. Internal diversification of regional investment attractiveness

Poviats (counties)

The poviat considered most attractive in Opole voivodship is the city of Opole - see Chart 2.

Chart 2. Potential investment attractiveness of poviats of Opole voivodship for the national economy and selected sections

Poviat	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
The city of Opole	0,351	A	A	A	A	A
krapkowicki	0,280	C	B	B	C	C
kędzierzyńsko-kozielski	0,270	C	C	C	C	C
brzeski	0,267	C	C	D	C	C

Source: Authors' own materials.

The following poviat should be distinguished: the city of Opole as this unit attained Class A in their potential investment attractiveness for all sections of the national economy under scrutiny in this research.

In reference to the sections mentioned below the following poviats should be additionally distinguished:

- Brzeski, kędzierzyńsko-kozielski (Class C) for section C,

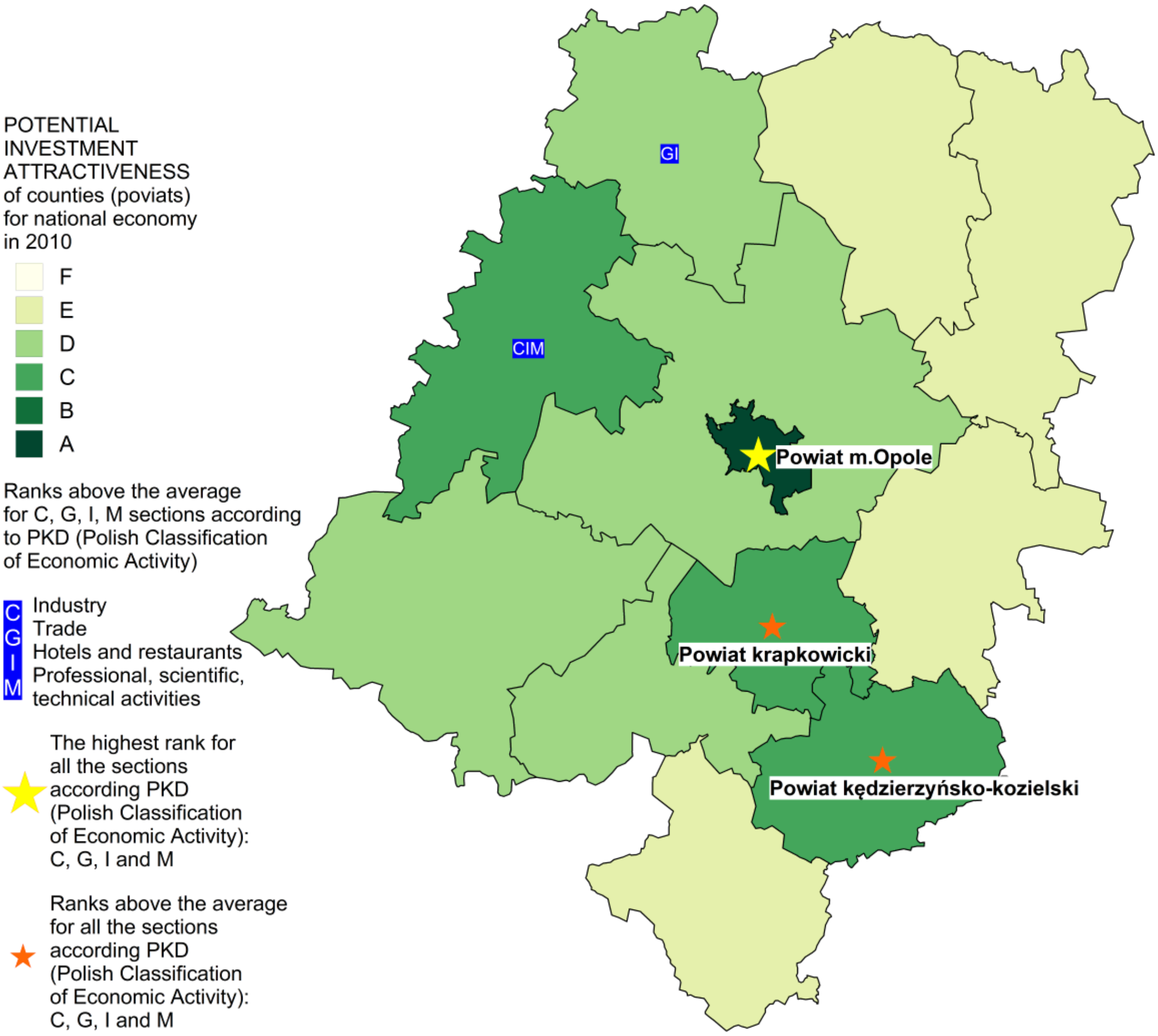
- Namysłowski, kędzierzyńsko-kozielski (Class C) for section G,

- Brzeski, kędzierzyńsko-kozielski, krapkowicki (Class C) for section I,

- Brzeski, kędzierzyńsko-kozielski, krapkowicki (Class C) for section M.

Synthetic evaluation of potential investment attractiveness of poviats of Opole voivodship is presented in Exhibit 4.

Exhibit 4. Spatial diversification of potential investment attractiveness of poviats of Opole voivodship with consideration of the most attractive sections



Source: Authors' own materials.

Gminas (communes)

Like poviats, gminas are also very much diversified in terms of investment attractiveness. The highest ranked gminas are: Brzeg (1), Opole (1), Kędzierzyn-Koźle (1), Zdzieszowice (3), Dobrzeń Wielki (2), Prudnik (3), Tułowice (2), Skarbimierz (2) , Namysłów (3), Gogolin (3). It is also reflected in their high ranks (Class A or B) for all analysed sections – see Chart 3.

Chart 3. Potential investment attractiveness of gminas of Opole voivodship for the national economy and selected sections

Gmina	PAI1_GN	PAI1_GN	PAI1_C	PAI1_G	PAI1_I	PAI1_M
Brzeg (1)	0,281	A	A	A	B	A
Opole (1)	0,261	A	A	A	A	A
Kędzierzyn-Koźle (1)	0,259	A	A	A	A	A
Zdzieszowice (3)	0,249	A	A	A	C	A
Dobrzeń Wielki (2)	0,238	A	A	A	B	A
Prudnik (3)	0,235	A	A	C	C	A
Tułowice (2)	0,234	A	A	A	B	A
Skarbimierz (2)	0,227	A	A	A	C	B
Namysłów (3)	0,226	A	A	A	A	B
Gogolin (3)	0,226	A	A	A	A	B

(1) – urban commune, (2) – rural commune, (3) – rural-urban commune
Source: Authors' own material.

Attractive are also such gminas which belong to Class B according to the PAI1_GN index as: Nysa (3), Chrząstowice (2), Kluczbork (3), Bierawa (2), Krapkowice (3), Ujazd (3), Niemodlin (3), Tarnów Opolski (2). The location-specific advantages are also universal in these gminas, which makes them attractiveness for all kinds of business activity in question.

In reference to the sections mentioned below the following gminas of Class C should be distinguished:

- Grodków (3), Lewin Brzeski (3), Głuchołazy (3), Paczków (3), Głogówek (3), Głubczyce (3), Kietrz (3), Polska Cerekiew (2), Walce (2), Olesno (3), Praszka (3), Dąbrowa (2), Łubniany (2), Ozimek (3), Popielów (2), Turawa (2), Izbicko (2), Kolonowskie (3), Leśnica (3), Strzelce Opolskie (3), Zawadzkie (3) – for section C,

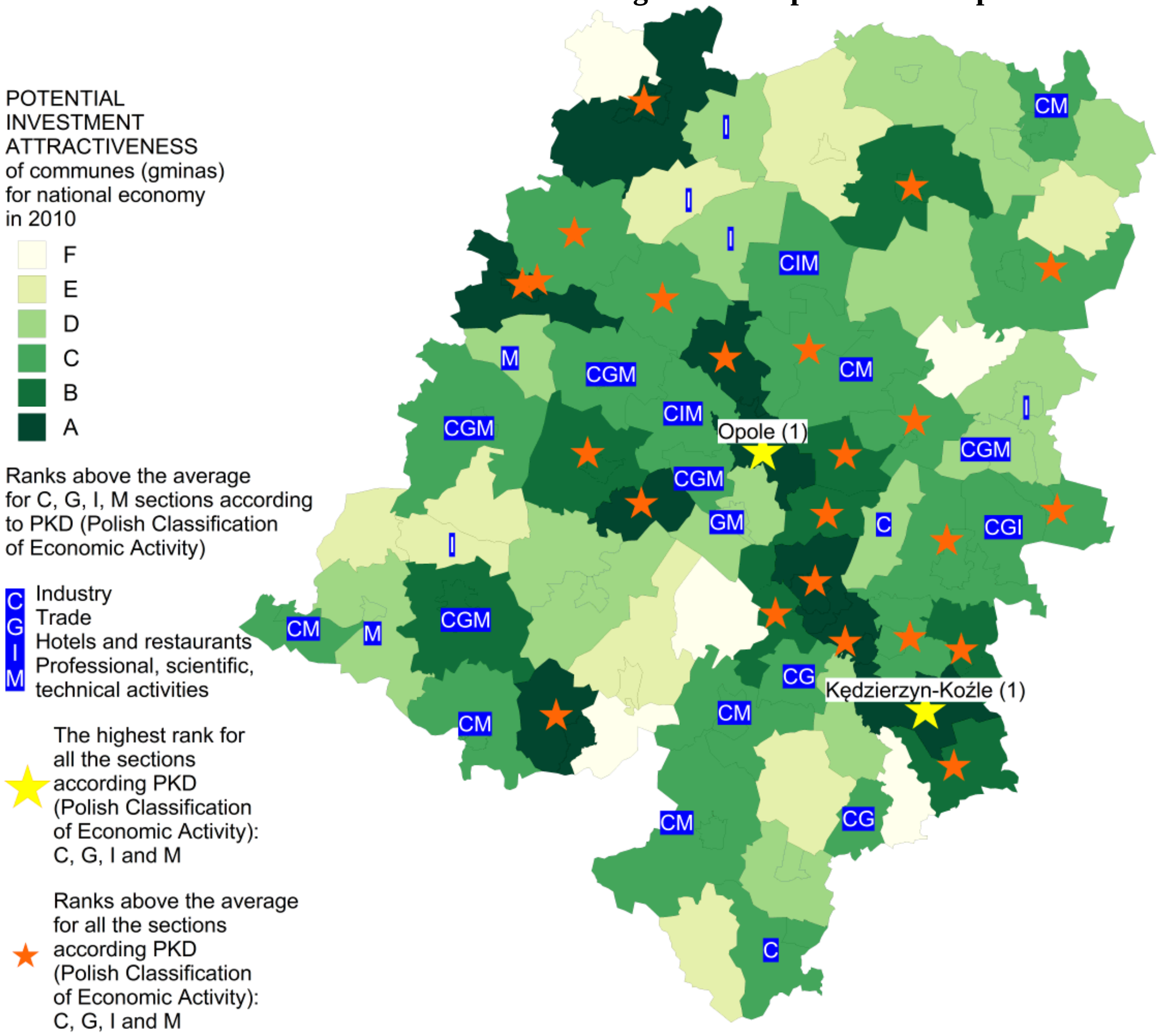
- Grodków (3), Lewin Brzeski (3), Prudnik (3), Polska Cerekiew (2), Walce (2), Olesno (3), Komprachcice (2), Niemodlin (3), Ozimek (3), Popielów (2), Prószków (3), Jemielnica (2), Kolonowskie (3), Leśnica (3) - for section G,

- Skarbimierz (2), Lubsza (2), Kluczbork (3), Domaszowice (2), Świerczów (2), Pakosławice (2), Prudnik (3), Bierawa (2), Zdzieszowice (3), Dobrodzień (3), Dąbrowa (2), Łubniany (2), Murów (2), Popielów (2), Tarnów Opolski (2), Jemielnica (2), Leśnica (3), Zawadzkie (3) - dla sekcji I,

- Grodków (3), Lewin Brzeski (3), Lubsza (2), Olszanka (2), Głuchołazy (3), Otmuchów (3), Paczków (3), Głogówek (3), Głubczyce (3), Bierawa (2), Praszka (3), Dąbrowa (2), Łubniany (2), Niemodlin (3), Popielów (2), Prószków (3), Turawa (2), Kolonowskie (3), Leśnica (3), Strzelce Opolskie (3), Ujazd (3), Zawadzkie (3) – for section M.

Synthetic evaluation of potential investment attractiveness of gminas of Opole voivodship is presented in Exhibit 5.

Exhibit 5. Potential investment attractiveness of gminas of Opole voivodship



Source: Authors' own materials.

4. Voivodship's institutional support for investors and entrepreneurs

The development of business surrounding in a region is a vital component of its investment attractiveness. The institutions that support entrepreneurship, pro-investment solutions, research commercialization and innovativeness are of special importance. Among the voivodeship's business-supporting institutions one should mention: Stowarzyszenie „Promocja Przedsiębiorczości" in Opole, Akademicki Inkubator Przedsiębiorczości przy Politechnice Opolskiej, Kędzierzyńsko – Kozielski Park Przemysłowy, Opolskie Centrum Rozwoju Gospodarki, Izba Gospodarcza „Śląsk" in Opole, Fundacja Rozwoju Śląska oraz Wspierania Inicjatyw Lokalnych in Opole, Opolski Regionalny Fundusz Poręczeń Kredytowych, Opolska Izba Gospodarcza, Nyska Regionalna Izba Gospodarcza, Namysłowskie Stowarzyszenie Inicjatyw Gospodarczych, Opolskie Centrum Transferu

Innowacji, Ośrodek Innowacji NOT in Opole, Akademicki Inkubator Przedsiębiorczości (business incubator) of the University of Opole, Opolski Park Naukowo- Technologiczny, Izba Rzemieślnicza in Opole, Manpower Brzeg, Adecco Poland Opole, Deloitte Biuro in Opole.

Stowarzyszenie „Promocja Przedsiębiorczości" in Opole ('Entrepreneurship Promotion' Society in Opole). The society runs an Entrepreneurship Incubator, which offers favourable office, warehouse and workshop space conditions as well as business supporting services (promotion, legal, financial and marketing advice). The Society operates an Entrepreneurship Development Fund (financial help for unemployed in form of loans for creating and expanding businesses) as well as an Entrepreneurship Support Centre (training and consulting services). For investors the society offers services in the field of investment localisation, support in contacts with local and central administration, preparation and support for investment process, seeking trade partners, support in acquiring EU funding and public-private partnership preparation. The Society cooperates with the EEN in Opole, which offers services for S&M enterprises. The entrepreneurs are able to benefit from free consulting in the field of trade and service exchange in the EU as well as innovations and new technology implementation and acquiring investment financing. The businesses are also supported in seeking cooperation partners by means of a database of technology offers – Bulletin Board Service (BBS) and Business Co-operation Database (BCD). (www.spp.opole.pl/, 01.10.2012.).

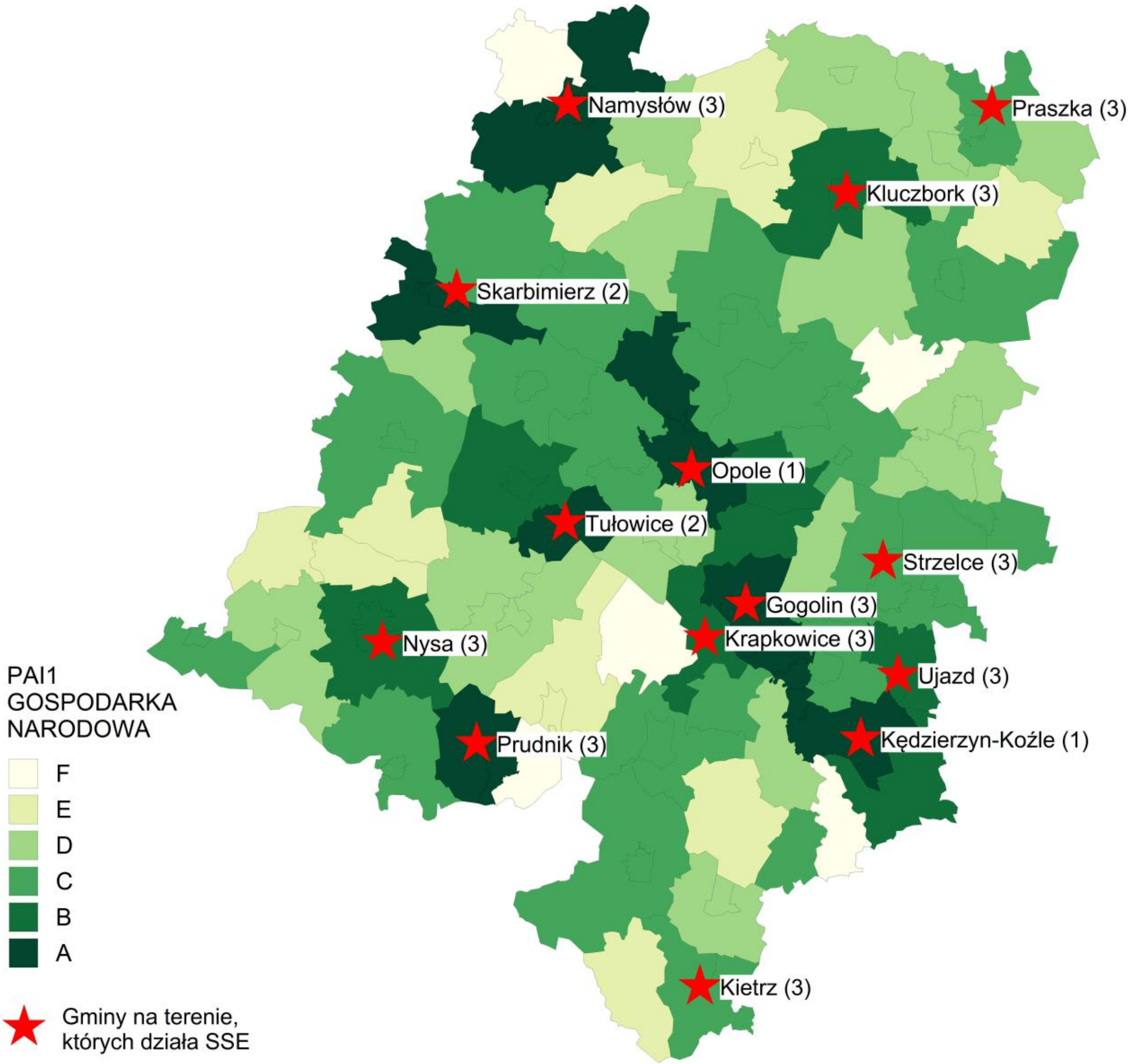
Akademicki Inkubator Przedsiębiorczości przy Politechnice Opolskiej (Academic Entrepreneurship Incubator at Opole Institute of Technology). The Incubator operates a database of abstracts of bachelor, master, doctoral and habilitation thesis of students and staff of Opole Institute of Technology as well as a database of proposal of thesis subjects submitted by businesses and institutions, which – after approval – are presented to students and research staff. The initiative "We don't write thesis to be put away on a shelf" aims to present research results according to the demand of businesses and regional economy as well as to facilitate practical use of knowledge acquired during the course of studies. (www.inkubator.po.opole.pl/, 01.10.2012.).

Kędzierzyńsko-Kozielski Park Przemysłowy Sp. z o.o. (Kędzierzyńsko-Kozielski Industrial Park LLC) offers investment areas furnished with basic amenities and office, production and warehouse spaces for production and services. The entrepreneurs can use the office centre, consulting and financial services. The Park operates a Technology Incubator, which offers infrastructure and services supporting the technology transfer and innovations commercialisation. (www.kkpp.pl/, 01.10.2012.).

Special economic zones in Opole voivodship – effects

There are three special economic zones (SSE) in Opole voivodship: Katowicka, Wałbrzyska and Starachowicka. At the end of 2011 the areas of SSE were part of 2 cities and 12 gminas (counties). (Exhibit 6).

Exhibit 6. The location of SSE in Opole voivodship



Source: Authors' own calculations.

First SSEs were established in 1996 in Strzelce Opolskie and next – in 2003. The enterprises operating in the zones have until 2011 invested 2.2 billion PLN which constitutes 3% of all economic zone capital expenditures in Poland. In the same period the enterprises have created 2.3 thousand jobs, which constitutes 1% of all new jobs created in economic zones - cf. Chart 4.

Chart 4. Effects of special economic zone functioning at the end of 2011.

SSE/ Gmina	Leading industries (capital expenditure larger than 20% of overall capital expenditure in the subzone)	New jobs created	Cumulated capital expenditure in million PLN
Katowicka SSE, Gogolin (3)	Data unavailable		
Katowicka SSE, Kędzierzyn-Koźle (1)	Data unavailable		
Katowicka SSE, Kietrz (3)	Data unavailable		
Wałbrzyska SSE, Kluczbork (3)	Machinery and equipment	162	409,0
Katowicka SSE, Krapkowice (3)	Data unavailable		
Wałbrzyska SSE, Namysłów (3)	Data unavailable		
Wałbrzyska SSE, Nysa (3)	Synthetic materials	62	19,2
Wałbrzyska SSE, Opole (1)	Jewellery	1	1,3
Wałbrzyska SSE, Praszka (3)	Machinery and equipment	131	75,6
Wałbrzyska SSE, Prudnik (3)	Machinery and equipment	11	5,3
Wałbrzyska SSE, Skarbimierz (2)	Food products	1.111	1.251,9
Katowicka SSE, Strzelce Opolskie (3)	Wood processing	272	408,0
Starachowicka SSE, Tułowice (2)	Final metal products, rubber, synthetic materials	575	60,9
Katowicka SSE, Ujazd (3)	No investors		

Source: Authors' own calculations based on PAIiIZ data..

Largest investments have been made in Skarbimierz: Cadbury Polska Sp. z o. o. (Netherlands, chewing gum), Cadbury Sp. z o. o. (Netherlands, chocolate), Keiper Polska Sp. z o.o. (Germany, car seats elements), FPS Polska Sp. z o.o. (Germany, metal packaging).

The SSE development plan assume that the voivodeship will attract investments:

- From advanced technology industries and data processing services – in Katowicka SSE,
- From food-processing, chemical, energy, mineral resources, machinery, metal and furniture industries – in Starachowicka SSE,
- Related to logistics and traditional voivodeship's industries – furniture and wood branches – in Wałbrzyska SSE.

‘A’ Commune

Student Scientific Organisation for Entrepreneurship and Regional Analyses affiliated to the Institute of Enterprise of the Warsaw School of Economics, has again published the results of its research into the quality of investor assistance given by the communal authorities. The subject of this study of investment attractiveness is: an audit of Web sites and audit of e-contact in Polish and English with communal authorities. The effect of this study is a ranking ‘A’ Commune, which is thought to distinguish best performing self-government territorial units in terms of the use of means of electronic communication in their assistance. The research is carried out using the mystery client method. In this year’s edition all gminas belonging to Class A according to the PAI 2010 index were subject to query.

As a result 70 gminas have been distinguished; this includes 3 gminas situated in Opole voivodship. – see Chart 5.

Chart 5. Gminas in Opole voivodship distinguished as ‘A’ Communes

Gmina	Poviat	Audit of Web sites	Audit of e-contact in Polish	Audit of e-contact in English	Sum
Kędzierzyn-Koźle (1)	kędzierzyńsko-kozielski	9	5	0	**14**
Nysa (3)	nyski	9	0	4,5	**13,5**
Zdzieszowice (3)	krapkowicki	9	4	0	**13**
Prudnik (3)	prudnicki	8	5	0	**13**

Source: Authors’ own materials.

The Web site of Kędzierzyn Koźle commune stands out thanks to its online service centre. What is more, in the correspondence the communes of Kędzierzyn-Koźle and Prudnik suggested holding a meeting to discuss the details of investment and giving information on financial suport from the commune. Nysa was the only distinguished commune in Opole voivodship to have replied to an e-mail in English; it requested more detailed information in order to prepare a suitable investment offer.

5. Region's strengths and weaknesses

Opole voivodship has its unique character and clear specificity which influences its strengths and weaknesses. If divided according to the main factors of location and location conditions classified into microclimates composing potential and real investment attractiveness, they can be grouped into strengths (microclimates ranking A, B or C) and weaknesses (microclimates ranking D, E or F) – see Chart 6.

Chart 6. Strengths and weaknesses of Opole voivodship

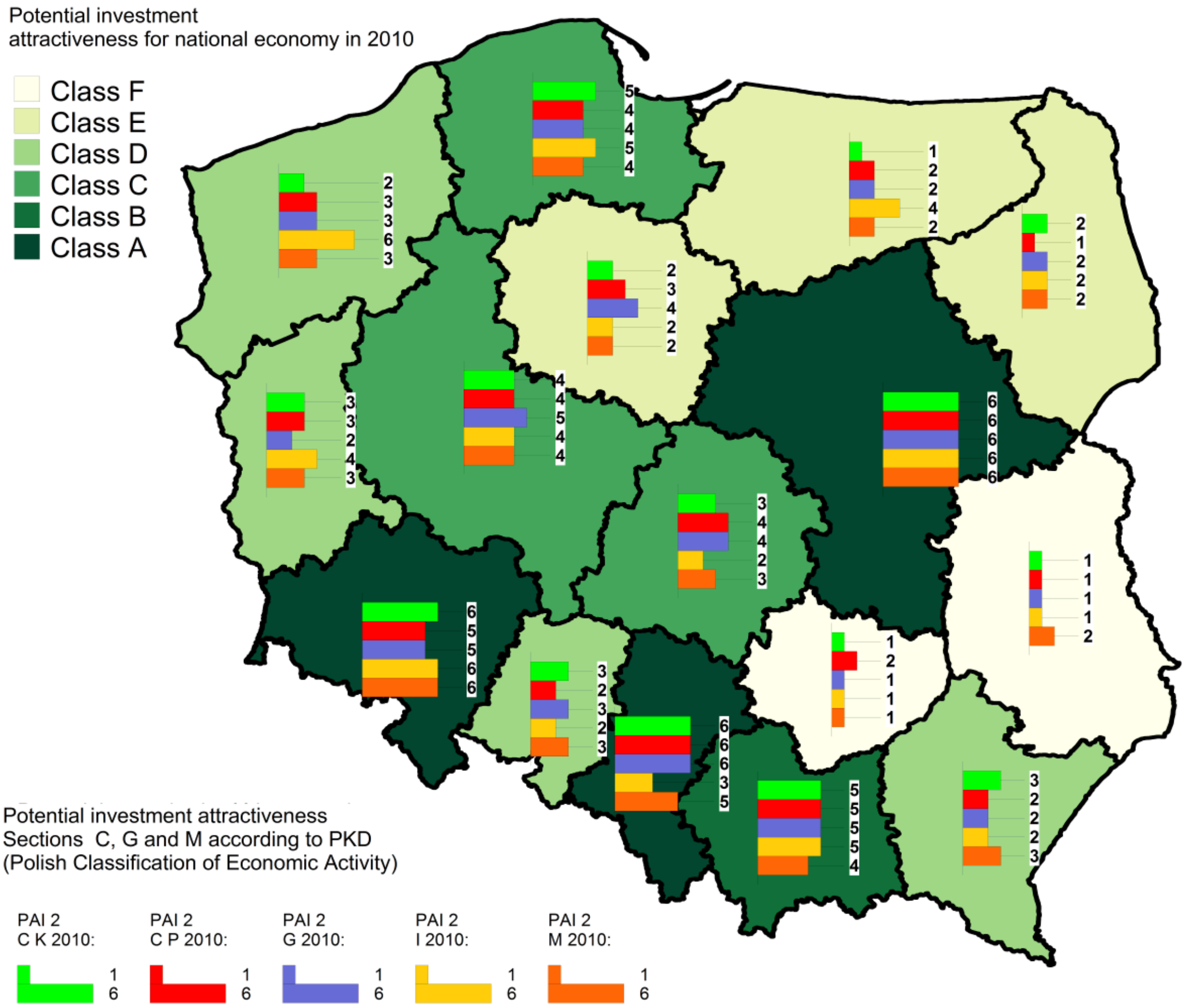
Strengths of the region according to the microclimates by IP SGH	Weaknesses of the region according to the microclimates by IP SGH
National economy	
Microclimate Social Infrastructure Class C Microclimate Social Capital Class C Microclimate Innovativeness Class C Labour productivity in enterprises Class C Profitability of enterprises Class B Self-financing of self-government units Class C	Microclimate Human Resources Class D Microclimate Technical Infrastructure Class D Microclimate Market Class D Microclimate Administration/Governance Class D Returns on tangible assets Class F Investment outlays Class F
Capital intensive industry	
Microclimate Social Infrastructure Class C Microclimate Social Capital Class B Microclimate Innovativeness Class C Self-financing of self-government units Class C Investment outlays Class C	Microclimate Human Resources Class E Microclimate Technical Infrastructure Class D Microclimate Market Class D Microclimate Administration/Governance Class E Returns on tangible assets Class F Labour productivity in enterprises Class D
Labour intensive industry	
Microclimate Human Resources Class C Microclimate Social Infrastructure Class A Self-financing of self-government units Class C Investment outlays Class C	Microclimate Technical Infrastructure Class D Microclimate Social Capital Class E Microclimate Market Class D Microclimate Administration/Governance Class E Returns on tangible assets Class F Labour productivity in enterprises Class D
Trade	
Microclimate Social Capital Class C Labour productivity in enterprises Class C Self-financing of self-government units Class C Investment outlays Class C	Microclimate Human Resources Class D Microclimate Technical Infrastructure Class D Microclimate Social Infrastructure Class E Microclimate Market Class D Microclimate Administration/Governance Class E Returns on tangible assets Class D
Tourism	
Microclimate Social Infrastructure Class C Microclimate Social Capital Class A Self-financing of self-government units Class	Microclimate Human Resources Class E Microclimate Technical Infrastructure Class E Microclimate Market Class E

C	Microclimate Administration/Governance Class D Returns on tangible assets Class D Labour productivity in enterprises Class E Investment outlays Class F
Professional, scientific and technical activities	
Microclimate Social Infrastructure Class C Microclimate Social Capital Class C Returns on tangible assets Class C Self-financing of self-government units Class C	Microclimate Human Resources Class D Microclimate Technical Infrastructure Class D Microclimate Market Class D Microclimate Administration/Governance Class D Microclimate Innovativeness Class D Labour productivity in enterprises Class E Investment outlays Class F

Source: Authors on the basis of the results of research of the Institute of Enterprise of the Warsaw School of Economics (IP SGH).

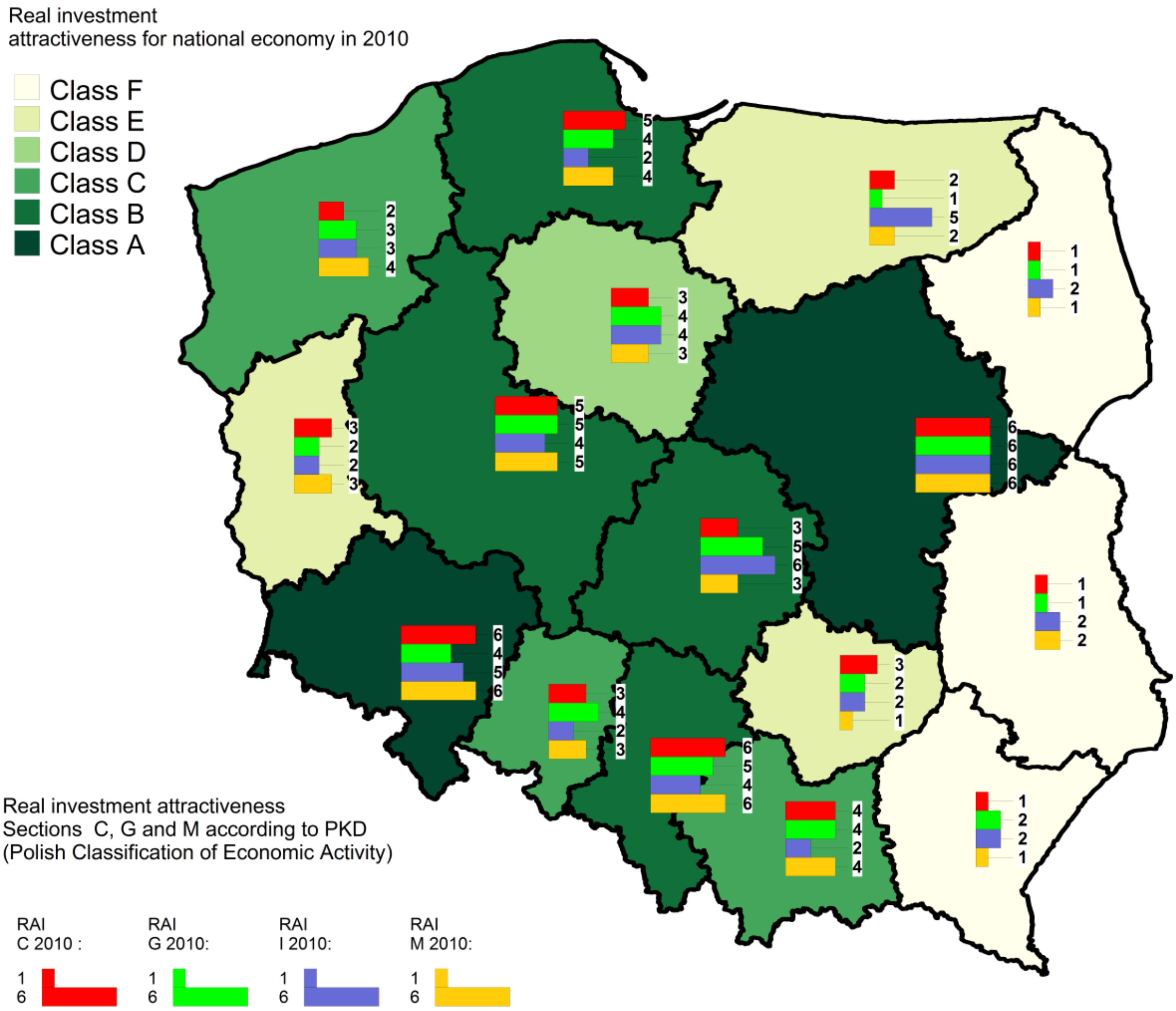
APPENDIX

Exhibit 1. Potential investment attractiveness of Polish voivodship broken down by basic sections of the national economy



Source: Authors' own materials.

Exhibit 2. Real investment attractiveness of Polish voivodship broken down by basic sections of the national economy



Source: Authors' own materials.

Chart 1. List of investment attractiveness indices for voivodships

Voivodship	LOWER SILESIAN	KUYAVIAN-POMERANIAN	LUBLIN	LUBUSZ	ŁÓDŹ	LESSER POLAND	MASOVIAN	OPOLE	SUBCARPATHIAN	PODLASKIE	POMERANIAN	SILESIAN	ŚWIĘTOKRZYSKIE	WARMIAN-MASURIAN	GREATER POLAND	WESTERN POMERANIAN
PAI1 GN	A	E	F	C	D	C	A	E	D	E	B	A	F	D	B	C
PAI2 GN	A	E	F	D	C	B	A	D	D	E	C	A	F	E	C	D
RAI GN	A	D	F	E	B	C	A	C	F	F	B	B	E	E	B	C
PAI1 C	A	D	F	C	C	C	A	D	E	E	B	A	F	E	C	C
PAI2 C KAPITAŁ	A	E	F	D	D	B	A	D	D	E	B	A	F	F	C	E
PAI2 C PRACA	B	D	F	D	C	B	A	E	E	F	C	A	E	E	C	D
RAI C	A	D	F	D	D	C	A	D	F	F	B	A	D	E	B	E
PAI1 G	A	E	F	C	D	B	A	D	E	F	B	A	F	C	C	C
PAI2 G	B	C	F	E	C	B	A	D	E	E	C	A	F	E	B	D
RAI G	C	C	F	E	B	C	A	C	E	F	C	B	E	F	B	D
PAI1 I	B	E	F	B	E	B	A	E	D	E	B	D	F	B	C	A
PAI2 I	A	E	F	C	E	B	A	E	E	E	B	D	F	C	C	A
RAI I	B	C	E	E	A	E	A	E	E	E	E	C	E	B	C	D
PAI1 M	A	E	F	C	D	C	A	D	D	F	B	B	F	D	B	C
PAI2 M	A	E	E	D	D	C	A	D	D	E	C	B	F	E	C	D
RAI M	A	D	E	D	D	C	A	D	F	F	C	A	F	E	B	C

Source: Authors on the basis of the results of statutory research carried out in the Collegium of Business Administration under the guidance of H. Godlewska-Majkowska.

Chart 2. Potential investment attractiveness of poviats of Opole voivodship for the national economy and selected sections

Poviats (counties)	PAI1_GN	PAI1_GN_ Classes	PAI1_C_ Classes	PAI1_G_ Classes	PAI1_I_ Classes	PAI1_M_ Classes
The city of Opole	0,351	A	A	A	A	A
krapkowicki	0,280	C	B	B	C	C
kędzierzyńsko-kozielski	0,270	C	C	C	C	C
brzeski	0,267	C	C	D	C	C

Source: See Chart 1.

Chart 3. Potential investment attractiveness of gminas of Opole voivodship for the national economy and selected sections

Gmina (commune)	PAI1_GN	PAI1_GN_classes	PAI1_C_ classes	PAI1_G_ classes	PAI1_I_ classes	PAI1_M_ classes
Brzeg (1)	0,281	A	A	A	B	A
Opole (1)	0,261	A	A	A	A	A
Kędzierzyn-Koźle (1)	0,259	A	A	A	A	A
Zdzieszowice (3)	0,249	A	A	A	C	A
Dobrzeń Wielki (2)	0,238	A	A	A	B	A
Prudnik (3)	0,235	A	A	C	C	A
Tułowice (2)	0,234	A	A	A	B	A
Skarbimierz (2) *	0,227	A	A	A	C	B
Namysłów (3)	0,226	A	A	A	A	B
Gogolin (3)	0,226	A	A	A	A	B
Nysa (3)	0,220	B	B	B	D	A
Chrząstowice (2)	0,215	B	B	B	B	B
Kluczbork (3)	0,214	B	B	B	C	B
Bierawa (2)	0,211	B	B	B	C	C
Krapkowice (3)	0,211	B	B	B	B	A
Ujazd (3)	0,210	B	B	B	B	C
Niemodlin (3)	0,204	B	B	C	A	C
Tarnów Opolski (2)	0,204	B	B	B	C	B

Source: See Chart 1.
Note: all indices in this report have been computed on the basis of the most up-to-date data from the Local Data Bank (2012).